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Message Text

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PAGE 01 MOSCOW 10201 221617Z

53
ACTION EUR-12

INFO OCT-01 ISO-00 SP-02 AID-05 EB-07 NSC-05 CIEP-01

TRSE-00 SS-15 STR-04 OMB-01 CEA-01 H-02 PA-01 PRS-01

USIA-06 AGR-05 CIAE-00 COME-00 FRB-03 INR-07 NSAE-00

XMB-02 OPIC-03 /084 W
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TO SECSTATE WASHDC 2455
INFO AMEMBASSY BELGRADE
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DEPARTMENT PASS AGRICULTURE

E.O. 11652 N/A
TAGS: EAGR UR
SUBJ: USSR AGRICULTURE AT MID-YEAR

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1. THE MID-YEAR PLAN RESULTS FOR AGRICULTURE ADD NO SIGNIFICANT DATA

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THAT WOULD GIVE CLUSE ABOUT CURRENT CROP DEVELOPMENTS OR
PROBABLE ADJUSTMENTS IN PLANNING TO ACCOMMODATE FOR EXPECTED
SHORTFALLS. THE ANNOUNCED POSITIVE GAINS -- GROWTH IN LIVESTOCK
PRODUCTION, PROCUREMENT, AND THE INCREASE IN CAPITAL INVESTMENT
MOREOVER POINT MORE TO POSSIBLE UPWARD CHANGES IN PRODUCTIVITY
THAN TO UPWARD CHANGES IN OUTPUT. THE NEGATIVE ASPECTS OF
AGRICULTURE WHICH CAN BE ASSUMED FROM THE
VOIDS IN DATA, ALTERNATIVELY SUGGEST A YEAR END GROSS PRODUCTION
VALUE THAT CAN HARDLY BE ABOVE LAST YEAR AND MIGHT EVEN BE LESS.

2. WHAT COULD EMERGE ON THE POLICY SIDE DURING THE REMAINDER OF
THE YEAR FROM THESE OBSERVED DEVELOPMENTS IS A MORE OPEN CRITICISM
OF (1) THE PRODUCTION RESULTS RELATIVE TO THE HIGH RATE OF INVEST-
MENT, (2) THE HIGH COST OF ADDITIONAL IMPORTS NEEDED TO SUSTAIN
THE MOMENTUM OF AGRICULTURE, AND (3) THE MANAGERIAL AND ORGANIZA-
TIONAL SHORTCOMINGS OF THE FARM SECTOR.

3. HOWEVER WITH COMMITMENTS FOR THE TENTH FIVE YEAR PLAN ALREADY
FAR ALONG, IT IS DOUBTFUL THAT SHIFTS AWAY FROM APPROVED PROGRAMS
WILL DEVELOP. A MORE LIKLEY OCCURRENCE WOULD BE SOME CHANGES IN
THE MIDDLE AND UPPER ADMINISTRATIVE AND PARTY PERSONNEL RESPONSIBLE
FOR AGRICULTURE'S SPOTTY PERFORMANCE. PERHAPS EQUALLY IMPORTANT
ON THE POLICY SIDE IS THE REAL NEED OF POLICY MAKERS AND PLANNERS
TO RE-EXAMINE AUTARKIC CONCEPTS AND GOALS WITH THE GROWING NEED
FOR INTERDEPENDENCE.

4. PERTINENT PUBLISHED DATA POINT TO THE HIGHER SOWN AREA OF
ALL CROPS -- MORE THAN 217 MILLION HECTARES -- AND THE INCREASED
AREA OF LAND UNDER IRRIGATION.

5. LIVESTOCK NUMBERS FOR STATE AND COLLECTIVE FAMRS ON JULY 1
WITH COMPARISONS FOR 1974 SHOW THE FOLLOWING (NUMBERS IN MILLION
OF HEAD):

	1974	1975
CATTLE	84.0	86.6
OF WHICH COWS	26.8	27.5
HOGS	54.6	55.6
SHEEP AND GOATS	146.1	146.8
POULTRY	558.0	573.3

THE OMISSION OF LIVESTOCK NUMBERS HELD ON PRIVATE PLOTS AND OTHER
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PAGE 03 MOSCOW 10201 221617Z

GOVERNMENT ENTERPRISES HOWEVER PRECLUDES A JUDGMENT OF REAL GAINS.

6. GOVERNMENT PROCUREMENT OF LIVESTOCK PRODUCTS FOR THE FIRST
SIX MONTHS DOES INCLUDE PURCHASES FROM ALL SECTORS AND THE UPWARD
SHIFT IN THE VOLUME OF PURCHASES AT LEAST SUGGESTS THAT MORE WAS
SOLD IN THE FIRST HALF OF 1975 THAT 1974. IT WOULD BE INCORRECT
TO ASSUME THAT TOTAL PRODUCTION OF LIESTOCK PRODUCTS INCREASED
AT THE SAME RATE.

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7. DATA ON PROCUREMENT WITH COMPARISONS FOR 1974 SHOW THE FOLLOWING:

	FIRST HALF YEAR RESULTS	
	1974	1974
LIVESTOCK AND POULTRY (LIVE WEIGHT) MILLION TONS	7.4	7.8
MILK MILLION TONS	28.2	28.8
EGGS BILLION UNITS	17.4	18.9

8. TOTAL CAPITAL INVESTMENT BY THE GOVERNMENT AND COLLECTIVE FARMS REPORTEDLY AMOUNTED TO NEARLY 13 BILLION RUBLES -- AN INCREASE OF EIGHT PERCENT OVER 1974. IRRIGATION AND LAND RECLAMATION ALONE RECEIVED 2.8 BILLION RUBLES -- 13 PERCENT GREATER THAN 1974.

9. AGRICULTURE ALSO WAS SUPPLIED WITH 174,500 TRACTORS, 123,000 TRUCKS AND SPECIAL VEHICLES, 43,000 GRAIN COMBINES, 35,300 SILAGE HARVESTERS, AND MANY OTHER TYPES OF MACHINES AND MACHINERY. NO COMPARABLE DATA WERE GIVEN FOR 1974.

10. FERTILIZER USE BY AGRICULTURE AMOUNTED TO 35.4 MILLION TONS, OR FOUR MILLION TONS MORE THAN FOR THE COMPARABLE PERIOD IN 1974. FEED PHOSPHATES AMOUNTED TO 1,146,000 TONS -- 187,000 TONS MORE THAN 1974 BUT LESS THAN PLANNED.

11. THE FOOD INDUSTRY REPORTED AN OVERALL FIVE PERCENT GROWTH OVER 1974, BUT WITHIN THIS SECTOR THE DATA SHOW THAT PRODUCTION IN BOTH THE ANIMAL FAT AND VEGETABLE OIL INDUSTRIES DECLINED IN THE FIRST HALF OF 1975 COMPARED TO 1974, REFLECTING FEED SUPPLY PROBLEMS IN 1974/75 AND THE DECLINE IN SUNFLOWERSEED PRODUCTION. ANIMAL FAT PRODUCTION OF 604,000 TONS WAS 24,000 TONS LESS THAN THAT FOR JANUARY-JUNE 1974, AND VEGETABLE OIL PRODUCTION OF 1.8 MILLION TONS WAS 100,000 TONS LESS.
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12. TRADE TURNOVER ALSO SHOWS SOME INTERESTING DEVELOPMENTS RELATIVE TO LAST YEAR'S REPORTED PRODUCTION. MARGARINE SALES WERE DOWN TWO PERCENT AND POTATO SALES SHOWED NO CHANGE. HOWEVER THE TOTAL VOLUME OF SALES IN THE STATE AND COOPERATIVE SOTRES WAS GREATER AND DOES SUGGEST THAT MORE OF THE POPULATION IS BUYING DIRECTLY FROM STATE OUTLETS AND LESS FROM THE COLLECTIVE FARM MARKETS AND ALSO DEPENDING LESS ON SUPPLIES FROM HOUSEHOLD PLOTS.
STOESSEL

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Message Attributes

Automatic Decaptioning: X
Capture Date: 01 JAN 1994
Channel Indicators: n/a
Current Classification: UNCLASSIFIED
Concepts: AGRICULTURAL PRODUCTION, DATA
Control Number: n/a
Copy: SINGLE
Draft Date: 22 JUL 1975
Decaption Date: 01 JAN 1960
Decaption Note:
Disposition Action: RELEASED
Disposition Approved on Date:
Disposition Authority: MartinML
Disposition Case Number: n/a
Disposition Comment: 25 YEAR REVIEW
Disposition Date: 28 MAY 2004
Disposition Event:
Disposition History: n/a
Disposition Reason:
Disposition Remarks:
Document Number: 1975MOSCOW10201
Document Source: CORE
Document Unique ID: 00
Drafter: n/a
Enclosure: n/a
Executive Order: N/A
Errors: N/A
Film Number: D750253-0065
From: MOSCOW
Handling Restrictions: n/a
Image Path:
ISecure: 1
Legacy Key: link1975/newtext/t19750734/aaaabeen.tel
Line Count: 163
Locator: TEXT ON-LINE, ON MICROFILM
Office: ACTION EUR
Original Classification: LIMITED OFFICIAL USE
Original Handling Restrictions: n/a
Original Previous Classification: n/a
Original Previous Handling Restrictions: n/a
Page Count: 3
Previous Channel Indicators: n/a
Previous Classification: LIMITED OFFICIAL USE
Previous Handling Restrictions: n/a
Reference: n/a
Review Action: RELEASED, APPROVED
Review Authority: MartinML
Review Comment: n/a
Review Content Flags:
Review Date: 07 APR 2003
Review Event:
Review Exemptions: n/a
Review History: RELEASED <07 APR 2003 by IzenbeI0>; APPROVED <24 SEP 2003 by MartinML>
Review Markings:

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06 JUL 2006

Review Media Identifier:
Review Referrals: n/a
Review Release Date: n/a
Review Release Event: n/a
Review Transfer Date:
Review Withdrawn Fields: n/a
Secure: OPEN
Status: NATIVE
Subject: USSR AGRICULTURE AT MID-YEAR LIMITED OFFICIAL USE
TAGS: EAGR, EPAP, UR
To: STATE
Type: TE
Markings: Margaret P. Grafeld Declassified/Released US Department of State EO Systematic Review 06 JUL 2006